



Client Visit Report

To: Chuck Thomas, VP
Joe Heeb, DM
From: Patricia O'Hara
Sr. National Support Manager, School Services, Facilities
CC: Joe Albright, Lori Brodie, Scott Weisberg
Date: March 2, 2015
Client: Norman Public Schools

As requested, the following information is the result of the support visits I made to Norman, OK PS the weeks of February 17 – 20 and February 23 – 27.

Specific Purpose/Concern(s) of Visit:

I went to Norman initially to review the staffing and conduct a quality assessment. However, after visiting with Kevin Benda, GM he asked that I also spend time working with and coaching one of his managers Charles Wakefield because Charles has been on an Action Plan to improve his performance.

Staffing Levels: -

- 124 Custodial Positions
 - 18 FT OPEN positions
 - 14 PT OPEN positions

Norman has an exceedingly high number of OPEN positions which is negatively affecting both quality and employee morale. Kevin is using a combination of OT and temp labor to cover these positions as well as the daily call-offs, vacations, etc.

January, 2015 unemployment rate for Oklahoma is 4.2% compared to the national average of 5.7%. This combined with the minimum wage pay rate could account for the difficulty they are experiencing filling the vacancies. The new part time HR manager is providing support that has not previously been available and should add value to the recruitment and hiring process.

Recommendations:

- Continue to actively recruit
- Standardize and document the onboarding process of new hires to include hands-on training at the schools/buildings.
 - Helps managers hold employees accountable

- Brings consistency and standardization to the training program

Equipment, Chemicals & Chemical Dispensing Units

As I visited the schools I observed the following:

- Chemical spray bottles with no labels
- Wrong chemical placed in the chemical dispensing unit
- Chemical dispensing units that were labeled improperly
- A lead custodian admitted he had purchased a non-compliant chemical at the Dollar General store
- I saw several chemicals that are not on Sodexo's compliant list.

Recommendations:

Ecolab needs to be held accountable for the dispensing units labeled correctly and working properly

Managers should be consistently checking employee carts, closets and chemical dispensing units as they conduct their quality inspections to look for non-compliance. They should also follow through on correcting any misuse of chemicals.

It is my understanding that non-compliant chemicals must have DM approval. If not approved by the DM, I believe this should be addressed with the GM.

Systems & Quality:

The Sodexo QA program is in place and managers conduct quality inspections on a routine basis. I reviewed inspections conducted by the two managers and found Charles scores were consistently higher than Blake's scores.

I conducted QA inspections at several schools with the managers and found no glaring quality issues. However, because of the staffing challenges, many areas are receiving only priority daily cleaning such as trash removal, restroom cleaning and cleaning highly visible areas such as main entrance. Most of the hard surface corridors still have shine which is not always the case at this time of the year. I was able to coach the managers in certain areas where quality was a concern.

Recommendations:

Charles and Blake would benefit from conducting a few inspections together in both managers' area of responsibility.

I gave Kevin a different inspection form that I recommend to use. This form is tied to the APPA level scoring listing specific criteria required for each score given. The current inspection form used is more subjective.

Coaching & Training

I spent several evenings visiting schools with Charles in order for me to observe and evaluate his performance in the following areas.

- Employee and client interaction (communication)
- Quality inspections
- Sense of urgency
- Employee coaching / training
- Knowledge of chemicals, chemical dispensing units and cleaning standards
- Time management
- Balancing employee workloads / employee task schedules

Recommendations:

Charles has been a custodial manager at Norman for a few years, yet demonstrated to me he is not clear on some of the basic aspects of the custodial services and doesn't acknowledge his ownership in the program. He consistently said, "I don't know, Kevin just said to do it", or "I don't agree with Kevin but I can't do anything about it". I will share with Kevin the specific details, but for the purpose of this report I will bullet point the areas of concern where Charles is performing in my opinion below expectations.

- Employee and client interaction & Employee coaching / training
 - Kevin mentioned this was an area that was identified on an Action Plan that Charles needed to improve. However, Kevin said Charles had improved in this area. It is my opinion that Charles still can show improvement in communicating effectively. I observed him on a few occasions communicating poorly with his employees. Below is just one example.
 - He gave an employee a copy of the Custodial Daily Cleaning Routine without any explanation other than Kevin wants you to sign it. The employee took a copy and without reading it said "I know what to do with this" as he folded it and put in his pocket. I asked Charles why he didn't review it with the employee first and he said "Kevin just said for me to give it to the employee and have the employee sign it". When I reviewed the routine with Charles, I brought to his attention a couple of things that I questioned. Charles admitted he hadn't read the form and didn't realize exactly what it said. Charles failed to use this opportunity to discuss with the employee performance expectations, and he did not allow the employee to ask questions to ensure the employee understood what he was signing.
 - Because Kevin takes responsibility for the Day custodians, I found Charles at times not aware of what Kevin had instructed one of his employees to do. I observed an employee confused about his job because Charles was telling him one thing and the employee told him Kevin told him something else.
 - Charles should take the initiative and communicate with Kevin daily to clarify any potential misunderstanding about employee assignments.
- Quality Inspections
 - Charles is routinely conducting QAs in the schools. However, I was not able to observe any follow up on quality issues with either the client or the employees.

- Sense of urgency
 - Charles initially had trouble understanding what I meant by his lack of a sense of urgency. After sharing several examples with him regarding Irving Middle School on how he did not respond to his employees or quality issues in a timely manner, he finally acknowledged he understood.
- Knowledge of chemicals & cleaning standards
 - I asked several questions about chemicals and proper usage and Charles repeatedly said, I don't know, Kevin just said to use them. I asked some employees questions about chemicals and chemical dispensing units and found there was some confusion about what chemicals to use for certain tasks.
- Time management
 - Charles has trouble using his time wisely. For example he tends to go in and out of a building in 10-15 minutes in some cases only to check to see if the First Aid kit is in place. I suggested he would make better use of his time if he simply checked that when he conducted his quality inspection. I also noticed when he reports to work, he tends to sit back and snack and is in no particular hurry to get out to the schools.
- Balancing employee workloads / task schedules
 - When Charles and I visited with the lead custodian at Irving Middle School, I found out the lead had lost the color-coded floor plans indicating each employee's area of responsibility. The employee admitted he had changed the schedules. When I unitized the building and spoke with each employee, I discovered very unbalanced employee workloads and brought this to Charles attention.
 - I spent time with Charles showing him how to balance workloads and write task schedules to ensure employee's had fair and balanced schedules. I unitized two schools for him and gave him my recommendations for change. I reminded him it was his responsibility to know what was going on in his schools and that I should not have been the one that discovered this.

Summary:

Kevin and his managers are challenged daily with covering open and call-off positions which obviously affects the quality and has a negative impact on employee morale.

Employee training is a weak area. I discovered leads and managers do not consistently document coaching or hands-on training. This was evident to me as I observed employees performing their daily tasks using various systems of cleaning. As I spoke with some employees, I realized they did not always have a clear understanding of the proper use of chemicals, cleaning procedures or performance expectations.

The Ecolab representative, Garlen Clarabut is not actively supporting this account. I will follow up with Tammy Lake, Sr. Corporate Account Manager, Ecolab to discuss this problem.

In order for Charles Wakefield to be successful in his current role, he needs to improve and take ownership in the areas I mentioned in this report. Although I did spend more time with Charles, I was able to spend some time with Blake visiting his schools. I have a positive impression of Blake's management style. Since he comes from a HC background, I believe his biggest challenge is adjusting to managing several sites throughout the district and becoming familiar with the Sodexo Schools cleaning program.

Managers should be accountable to ensure employee workloads are fair and balanced. The employee's work schedule and performance expectation should be reviewed with the employee and a signed copy should be placed in the employee's personnel file.

I unitized two schools for Blake and two for Charles to help them understand how to gather information in order to create balanced employee task schedules. I left samples of these with Kevin.

I understand Kevin is trying to implement the TRAKKAR HC web-based application for managing work assignments. This currently is not being used in any of our School accounts. However, I reached out to Joe Albright, VP to get an assessment on how well it works in the two Campus accounts that are using it.